



Request for Quotation (RFQ) (RFQ1330388)

General Services Administration

Information Technology
for the

Office of the Chief Information Officer (OCIO)
Office of Corporate IT Services (IC)

September 13, 2018

EDMS and DSS Program Support

ISSUED TO:

**GSA SCHEDULE CONTRACTORS UNDER THE FEDERAL SUPPLY SCHEDULE 70
– SPECIAL ITEM NUMBER (SIN) 132 51 Information Technology Professional
Services**

**The North American Industry Classification Code (NAICS) is 541519, Other
Computer Related Services.**

**This requirement is being solicited as restricted to Women Owned Small
Businesses.**

1.0 INTRODUCTION

1.1 Purpose

The General Services Administration (GSA) Office of Corporate IT Services provides enterprise solutions for GSA's Corporate information technology (IT) systems portfolio and advises GSA's Service and Staff Offices on IT tools that support and enhance GSA's enterprise functions. The office of Corporate IT Services focuses on the delivery of innovative IT platforms, services, and solutions for the GSA IT enterprise.

The Enterprise Platform Solutions Division (ICP) drives faster delivery for cloud solutions through collaboration, transparency and cost control. This division leverages agile development and a shared services approach to deliver enterprise customer relationship management, document management, website content management and other enterprise-wide IT solutions that support both internal operations and customer service delivery.

In order to meet these goals, the GSA IT Office of Corporate Services has requirements for a broad range of management support services, including utilizing an Agile framework in order to plan and implement enterprise systems that further the GSA IT Office of Corporate Services mission efficiently and effectively.

1.2 Background

GSA IT Office of Corporate Services has developed shared services solutions for the implementation and integration of a Digital Signature Solution (DSS) based on OneSpan Sign, formerly known as eSignLive, an Electronic Document Management Solution (EDMS) based on Alfresco open source technology, and related Activiti Business Process Management (BPM) workflows that support GSA-wide document routing, signature, storage, and records management needs. The solutions are built to be utilized by individual GSA users, by departments, or as integrated components of larger enterprise-wide systems. Built utilizing platform-agnostic APIs, these solutions can be easily integrated into any GSA system, or utilized as standalone platforms to deliver automation solutions that automate manual document handling and records-keeping tasks. The EDMS and related tools improve access to GSA documents, address Records Management (RM) requirements, streamline responses to Freedom of Information Act (FOIA) and eDiscovery requests and decrease storage costs for physical/paper files.

GSA IT Office of Corporate Services will utilize an Agile framework to lead, facilitate, and manage IT requirements, deliverables, releases and all Agile ceremonies and artifacts related to the DSS, EDMS, and Activiti BPM solutions.

1.3 Objectives

This Statement of Work (SOW) describes the basic services the GSA-IT Office of IT Corporate Services is requesting from qualified contractors. The contract will establish the acquisition framework for delivering the full scope of services and capabilities to the GSA-IT Office of IT Corporate Services, as well as Regional activities. The overall objective of these requirements is to provide GSA-IT Office of IT Corporate Services

with expert and experienced IT-oriented Agile resources to plan, assess, design, test, and manage IT projects for DSS (OneSource Sign), EDMS (Alfresco), and BPM (Activiti) solutions.

2.0 Scope

The scope of this task order encompasses a broad range of IT-oriented Agile program and project management support, business analysis, software testing, taxonomy for IT systems, document management, IT records management, content management, system architecture, software training, system support, and customer-oriented software support:

- Work with the GSA-IT project manager, product owner, customers, Scrum teams, and interfacing system teams to develop requirements and solutions specific to the management, development and support of the DSS application utilizing the eSignLive/OneSpan product as well as related (DSS) software.
- Manage, develop and support of the EDMS Solution utilizing the Alfresco Document Management (DM) and Activiti Business Process Modeling (BPM) software solutions within an Agile PM, Development and Operational framework.
- Specific knowledge areas of Agile Project Management utilizing the Scrum and Kanban frameworks, all Agile team and user roles, ceremonies and artifacts, requirements/user story/acceptance criteria development, agile testing methods, agile delivery, implementation and support methods and any other Agile expertise required to manage the full lifecycle of IT project development and support.
- Specific knowledge areas of the eSignLive/OneSpan Sign product and related APIs used to integrate this vendor software with other applications.
- Specific knowledge of the GSA-IT EDMS solution and the Alfresco DM and Activiti BPM products as well as the APIs used to integrate these solutions with other GSA-IT platforms.
- An expertise in Information Taxonomy for systems and the development and rollout of a GSA-IT document management taxonomy to facilitate GSA-wide organization of documents within a document management system.
- An expertise in electronic Records Management and rollout of a GSA-IT electronic document records management solution utilizing the Alfresco Records Management module.

3.0 Specific Requirements or Tasks

The contractor shall be responsible for providing all management, personnel, and oversight to perform the tasks described below:

- Work with business and IT stakeholders to elicit requirements and develop user stories and story boards for the rollout and implementation of DSS, EDMS, and Activiti BPM solutions throughout GSA.
- Provide system architecture and design guidance for the development of highly reusable components for the integration of eSignLive / OneSpan Sign, Alfresco DM, and Activiti BPM into GSA-IT's suite of applications.

- Provide high-level and detailed estimates for IT projects and user stories that utilize the capabilities of GSA-ITs Digital Signature Solution (DSS) and Electronic Document Management Solution (EDMS) either as standalone solutions or as integrated solutions within the GSA-IT architecture.
- Provide Business and Technical Analysis and Support for the DSS, EDMS, and Activiti BPM systems (including support for automation of Interagency Agreements and Executive Business Case documents and related approval procedures). Develop user stories in close collaboration with stakeholders and the Product Owner, design and implement automated workflow, migration, and integration solutions.
- Provide customer support for DSS, EDMS, and Activiti BPM systems. Provide expertise to answer customer inquiries and provide hands-on training and support on the use of the applications.
- Develop training manuals, videos, and Wikis for customer self-support for the DSS, EDMS, and Activiti BPM solutions. Develop and participate in periodic training sessions as required by customers and stakeholders utilizing the best approach for each training situation.
- Provide system analysis, design, and testing within an Agile PM framework (Scrum and Kanban) for the DSS, EDMS, and Activiti BPM systems.
- Provide system Taxonomy expertise to develop and maintain a GSA-wide taxonomy for Document Management within the EDMS.
- Provide architecture, design, workflow development, testing, implementation, and customer support expertise for the development, improvement, and maintenance of a solution to forward emails and attachments from Gmail to the EDMS and to store these in an appropriate folder structure to meet business needs for retrieval and records management purposes.
- Develop and automate electronic records management (RM) workflow as part of the EDMS. Work closely with the GSA Records Managers to identify system and business requirements. Develop a RM roadmap and user stories to fully automate the declaration of EDMS stored documents as records and to properly handle the record type assignment and final disposition of such records.
- Develop system documentation as required by GSA-IT for the description and maintenance of the DSS, EDMS, and Activity BPM systems.
- Develop and present executive reviews of the DSS, EDMS, and Activiti BPM solutions and future work and plans to GSA-IT stakeholders, management, and upper management, on an as-needed or scheduled basis.
- Provide ScrumMaster and Agile PM oversight for the DSS, EDMS, and Activiti BPM solutions. Plan, manage and participate all Scrum and Kanban ceremonies, to include Roadmap planning, User Story development and refinement, Sprint Planning, Daily Standups, Sprint Reviews, and Sprint Retrospective.
- Provide Agile leadership to facilitate the team adoption of and adherence to Agile/Scrum principles and the Scrum framework. Coach the team and Product Owner on a regular basis. Protect the team from outside influences that could jeopardize their

planned deliverables. Work with the team to remove impediments to progress as soon as feasible.

- Provide JIRA expertise to develop and manage Scrum user stories for DSS, EDMS, and Activiti BPM projects in the form of Epics, Product Backlogs, and Sprint backlogs as well as Scrum reporting such as Burndown charts.
- Provide SME expertise for Document Management and in particular, the adoption of Alfresco as a Document Management tool within GSA, and the migration of documents to Alfresco/EDMS. Provide expertise in folder design, content modeling, content mapping, user permissions, migration planning and execution, integration design, and records management.
- Provide expertise for the Activiti BPM tool, workflow design, form design, user training, and user adoption of the tool. Work with users to develop workflows and solutions within the Activiti BPM framework to include integration with the DSS and EDMS.
- Support tools assessment in support of the Alfresco EDMS, DSS, and Activiti BPM solutions. Assist with the identification and evaluation of tools that enhance the capabilities of these systems. Examples include Taxonomy tools, Migration tools, plugins and open source APIs to integrate within these platforms.

4.0 Personnel Requirements

The following qualifications and skills apply to all positions required for this task order:

- Experience working with Agile project management methodologies; developing user stories, tracking backlogs, participating in agile project ceremonies
- Experience working with quality management approaches and techniques; experience working with delivery assurance policies, procedures, and to ensure compliance
- Experience working with client vision, business strategies/objectives, critical success factors and performance measures
- Experience working with delivery assurance principles and appropriate procedures
- Experience working with techniques and approaches related to system architecture, development, integration, and deployment of software
- Understanding and knowledge of the GSA IT organization and organizational methodology and have a demonstrable ability to manage organizational project management activities at the GSA Headquarters, and Regional Offices, as required
- Possess an Agile-centered mindset with interpersonal skills necessary to work well with a team, coach product owners and resolve conflicts with universally positive outcomes
- Closely coordinate with Product Owners located in various GSA Lines of Business, to elicit requirements and user stories and generate a backlog of requirements that the development team can act on
- Perform analysis to refine and reduce the backlog on a continuous basis
- Actively participate in retrospectives of the development and management processes to assess value delivery to customer

- Utilize tools that support the Agile software development process for requirements gathering/management and tools for work management/reporting
- Experience participating and facilitating meetings that include backlog grooming, business line prioritization, retrospectives, and daily stand up meetings, identifying bottlenecks, reducing work in progress, implementing quality controls, and reducing escaped defects technical debt
- Develop, implement and monitor activity of the Agile team through reporting mechanisms to include Backlog Management, Iteration Burndown, Release Burndown, Technical Debt, Changes Management, etc.
- Perform market research and perform gap analysis against defined requirements
- Assist with project schedule development, including task definition, duration, and resource estimates
- Ability to develop, facilitate, and provide training to GSA internal organizations and external partner agencies for implementation of initiatives
- Ability to facilitate meetings and conference calls, as required. This shall include scheduling the meetings; drafting and delivering agendas and meeting minutes; providing and archiving required documentation; and documenting, tracking, and following-up on action items from the meetings
- Ability to present information to various levels of management and support teams in a coherent manner to emphasize and ensure understanding of value added of current initiatives and best practices
- Ability to develop, provide, and organize best practices information, guides, wizards, and other materials to build government capability and provide training if needed
- Ability to provide a key role during strategy and product development by consulting with project teams recommending integration approaches, re-engineering opportunities, pilots, commercial software analysis and reviews

4.1 Labor Categories and Descriptions

Below is a list of labor categories required for this task order. Based on corresponding duties and requirements, each schedule holder shall map their GSA Schedule 70 to the ones listed below. Offerors may use any of their GSA Schedule 70 labor categories to represent more than one of the labor categories, as long as the labor category is capable of performing the duties described and fulfills the requirements.

4.1.1 Sr. Scrum Master

Example of Duties:

- Acts as Servant Leader to an Agile team removing impediments and ensuring team productivity. Leverages team resources to improve capacity for project work
- Manages risks and issues
- Leads Release Planning, Sprint Planning, Product and Sprint Backlog Grooming, Daily Scrums, Sprint Reviews, and Retrospective Meetings ensuring the commitments made are appropriate and uphold scrum principles. Track team delivery on commitments through the use of burndown charts and other visual methods
- Drives weekly backlog grooming sessions with the team, ensuring work items are estimated and 'ready-for-work' per the Product Owners priorities; holding the Team,

Product Owner and Stakeholders accountable for their commitments

- Tracks team velocity to ensure accuracy of future planning
- Leads team retrospectives and ensure key learning is incorporated into next sprint
- Provides, at a minimum, weekly written status reports to the project team which include the percentage of completion for each Story, the pass rate for the Story Tests, key project delivery milestone status, and estimated completion date for each milestone, as well as other information relevant for the delivery build
- Provides input to and participate in Release Planning, acting as a SME to Product Owner about velocity and point allocation
- Produces pre- and post-sprint plans and otherwise act as an information radiator
- Actively participate in activities related to Agile adoption across the organization
- Assists with internal and external communication, improving transparency, and providing information

Requirements/Education

- Industry recognized Scrum Master Certification (CSP, CPO, PSM II, etc.)
- At least 7 years experience serving in the Scrum Master role for a software development team that was diligently applying Scrum principles, practices, and theory in the Federal sector
- At least 2 years of experience maintaining and supporting an enterprise eSignLive (aka OneSpan Sign) digital signature platform
- At least 2 years of experience leading teams integrating digital signature automation tools with Alfresco content management and business process automation.
- At least 2 years of experience leading teams delivering enterprise Alfresco content management implementations, including records management workflow automation, in a public sector environment.
- At least 10 years experience in project management/coordination
- At least 5 years experience in Requirements gathering and analysis

4.1.2 Lead Analyst

Example of Duties:

- Gathers requirements for complex Alfresco implementation, integration, & enhancements.
- Leads and participate on teams on a variety of taxonomy, content management, document management, and information architecture projects
- Provides oversight on Design and develop of content models, security models, metadata schemas and content types
- Coordinates with business and technical stakeholders to create Enterprise Document Management solutions
- Assists with existing Enterprise Document Management, Records Management capabilities including existing sites, architectures, and content models.
- Assists with the enterprise deployment of Alfresco Records Management
- Designs and develops automated workflows to support Federal Records requirements for complete document lifecycle management from review, hold, transfer,

archive and eventual document destruction.

- Plans, facilitates, and lead stakeholder meetings and working sessions
- Plans and manages content audits and content analysis
- Plans and manages development of business and technical documentation
- Develops governance models, procedures, and policies
- Assists client Project Manager in producing executive level presentations for project stakeholders

Requirements/Education

- BS or BA (from an accredited institution) and 5 years of IT experience, including at least 5 years of experience in Enterprise Architecture and its components **OR** 8 years of IT experience, including at least 5 years of experience in Enterprise Architecture and its components.
- At least 3 years experience in project management/coordination and 3 years experience with one or more of the following areas: Document management, Content Management, Taxonomy, Digital Asset Management
- 1 or more years experience working with Alfresco
- Experience with Alfresco, Electronic Document Management Systems, Enterprise Content Management solutions, Records Management solutions, and e-SignLive or similar Digital Signature solutions is a plus;

4.1.3 Lead Information Taxonomy Analyst

Examples of Duties

- Leads the design and development of an enterprise taxonomy
- Develops and delivers taxonomy and content governance plans
- Reviews existing taxonomies and metadata schemas
- Provides critical reviews of client websites and information systems
- Develops taxonomy strategy and its deliverables

Requirements/Education

- At least 3 years designing and managing taxonomies, thesauri, and/or ontologies.
- 5+ years of consulting experience
- At least 1 year of experience developing content taxonomies for an Alfresco content management implementation, including records management workflow automation, in a public sector environment.
- Bachelor's degree or higher in Information Science, Knowledge Management, Library Science, or related field
- Proven experience working directly with clients, providing briefings, facilitating meetings, and presenting work products
- Experience with taxonomy or ontology management tools
- Experience with usability testing and user experience optimization

4.1.4 Jr. Scrum Master

Examples of Duties

- Assist Sr. Scrum Master with leading an Agile team removing impediments and ensuring team productivity. Leverages team resources to improve capacity for project

work

- Manages risks and issues
- Leads Release Planning, Sprint Planning, Product and Sprint Backlog Grooming, Daily Scrums, Sprint Reviews, and Retrospective Meetings ensuring the commitments made are appropriate and uphold scrum principles. Track team delivery on commitments through the use of burndown charts and other visual methods
- Drives weekly backlog grooming sessions with the team, ensuring work items are estimated and 'ready-for-work' per the Product Owners priorities; holding the Team, Product Owner and Stakeholders accountable for their commitments
- Tracks team velocity to ensure accuracy of future planning
- Leads team retrospectives and ensure key learning is incorporated into next sprint
- Provides, at a minimum, weekly written status reports to the project team which include the percentage of completion for each Story, the pass rate for the Story Tests, key project delivery milestone status, and estimated completion date for each milestone, as well as other information relevant for the delivery build
- Provides input to and participate in Release Planning, acting as a SME to Product Owner about velocity and point allocation
- Produces pre- and post-sprint plans and otherwise act as an information radiator
- Actively participate in activities related to Agile adoption across the organization
- Assists with internal and external communication, improving transparency, and providing information

Requirements/Education

- Industry recognized Scrum Master Certification (CSP, CPO, PSM II, etc.)
- At least 5 years experience in project management/coordination
- At least 2 years experience serving in the Scrum Master role for a software development team that was diligently applying Scrum principles, practices, and theory in the Federal sector
- At least 4 years experience in Requirements gathering and analysis
- At least 2 years of experience maintaining and supporting an enterprise eSignLive (aka OneSpan Sign) implementation.
- At least 2 years of experience leading teams integrating digital signature automation tools with Alfresco content management and business process automation.
- At least 1 year of experience maintaining and supporting an enterprise eSignLive (aka OneSpan Sign) implementation.
- At least 1 year of experience leading teams integrating digital signature automation tools with Alfresco content management and business process automation.

4.1.5 Solution Architect

Examples of Duties

- Provides expert guidance in analysis and design of information technology architectures, technology analyses, systems architectures, and strategic planning
- Works with various teams to support cultural change, software distribution, security, data distribution, and business process impacts

- Works with delivery teams to build component solutions or major solutions of various sizes and complexities
- Produces a detailed functional design document to match customer requirements both at an aggregate and at a per-system / deployment level
- Participates in process flow analysis and process redesign
- Shares best practices and be consultative to clients and business lines throughout duration of the project
- Completes and co-implements a configuration guide, along with authoring required technical documentation in support of the project
- Actively participates in test plan development and execution
- Assists in training design, documentation and delivery efforts
- Participates in and leads, when needed, project meetings with the customer(s) / business lines

Requirements/Education

- Bachelor's degree in Computer Science, Software Engineering, MIS or equivalent preferred;
- At least 8 years of enterprise IT application experience that includes at least 5 years of hands-on software development, DevOps engineering, or systems architecture
- At least 1 year experience architecting digital signature solutions using OneSpanSign (formerly known as eSignLive).
- At least 1 year experience architecting document management solutions leveraging Alfresco

4.1.6 Lead Tester

Examples of Duties

- Developing automation strategies to support regression testing based on the technical analysis, complexity and reusability.
- Providing technical coordination to the automation team to ensure minimal duplication of efforts through maximum reuse of defined solutions
- Decomposing requirements and developing test automation for projects of simple to high complexity
- Practicing automation development efficiency, maintainability and reusability - Assisting in managing and improving the coding standards
- Providing accurate implementation level estimates and delivers on them
- Experience in executing Proof of Concepts, evaluation of various testing tools as required and presenting results to clients.

Requirements/Education

- BS or BA (from an accredited institution) and
- At least 3-5 years of IT experience, including at least 3 years of experience as a tester serving agile projects.
- ICP-TST certification is preferred
- Strong DevOps, Agile understanding is MUST
- Should have sound knowledge of multiple development techniques, i.e. Test Driven

Development (TDD) , Behavior Driven Development (BDD)

- Experience with Selenium , Jenkins , Cucumber , Protractor and equivalent tool
- Experience in designing and maintaining test automation frameworks with industry standards
- Sound working experience on Core JAVA and other scripting language
- Strong background in coding for automation , without reliance on record and playback scripting
- Experience developing function libraries and generic scripts

Each task shall be staffed to the level proposed throughout the work effort. Changes in the staffing levels shall be submitted to the CO for approval. Upon approval, a modification to the task order will be issued. All other terms and conditions of the contractor's GSA Schedule contract shall apply.

5.0 Project Deliverables

All deliverables shall be delivered to the COR no later than the date specified in the SOW. Deliverables are to be transmitted with a cover letter, on the prime contractor's letterhead, describing the contents. The Contractor's delivery schedule shall be as follows:

Deliverables	Due Date
Monthly Status Report	End of each month
Project Roadmaps for DSS and EDMS	As needed by the Government
Team Working Agreement	As needed by the Government
User Stories and resulting Artifacts	As needed by the Government
User Training Documents	As needed by the Government
System Documentation	As needed by the Government
User-oriented and Technical System Overviews	As needed by the Government
Sprint Review Presentations	As needed by the Government
Sprint Backlogs in JIRA	As needed by the Government

Activiti BPM designs	As needed by the Government
Alfresco Content Models	As needed by the Government
System Architecture Models	As needed by the Government
EDMS System Taxonomy	As needed by the Government
EDMS Content Models and Content Type Designs	As needed by the Government
Document migration Content and Folder Mapping documents	As needed by the Government
Activiti Screen Forms	As needed by the Government
Activiti Workflow Designs, including “As-Is” and “To-Be” diagrams	As needed by the Government
eSignLive/OneSpan Sign Workflows, Document Templates, and Document Layouts	As needed by the Government
Management Presentations	As needed by the Government

The Contractor shall deliver the deliverables specified in Section 5 (and any additional deliverables that the Contracting Officer may require in writing) on dates specified therein, or on such revised dates as the Contracting Officer may specify. The Government shall have unlimited rights in all such deliverables in accordance with the FAR clause at 52.227-14(b), which is hereby incorporated by reference into this task order. The Contractor may mark the deliverables to indicate its authorship, provided, however, that it shall not include any markings inconsistent with the Government's unlimited rights. The Contractor agrees that the Government may release any deliverable in response to a Freedom of Information Act (FOIA) request, subject to any right to object or to request redactions that the Contractor may otherwise have under the Act or under applicable agency regulations.

All deliverables in printed or other media forms containing personally identifiable information (PII) and/or sensitive but unclassified (SBU) information shall follow applicable policies including General Services Administration Document security for Sensitive But Unclassified Building Information (PBS P 3490.2). The Contractor shall ensure and deliver the system is designed to function in accordance with applicable Federal Information Processing Standards Publication (FIPS PUB) 140-2 and all

applicable annexes or subsequently approved federally recognized policy for the protection, operation and/or delivery of Federal information technology systems.

6.0 Place and Period of Performance

Unless otherwise specified, work is expected to be performed from the contractor's work location or virtually within the Continental United States. Contractor personnel shall report to the GSA headquarters (1800 F Street NW - Washington, DC) a minimum of three times per week. Core hours will generally be 7:30AM through 4:00PM Eastern Time, Monday through Friday, excluding Federal holidays. All contract personnel assigned to this contract are expected to conform to customer Agency normal operating hours.

The period of performance of this task order shall be a base year plus two (2) option periods, each twelve (12) months in duration. The anticipated period of performance is as follows:

Base Year:	Date of Award plus twelve months
Option Year 1:	End of Base year plus twelve months
Option Year 2:	End of Option Year 1 plus twelve months

6.1 Telework / Operating Status

GSA may temporarily allow Contractor employees working in an Agency worksite to be in telework status. The primary period may occur when the Office of Personnel Management (OPM) has issued an updated operating status announcement of "FEDERAL OFFICES ARE CLOSED – EMERGENCY AND TELEWORK-READY EMPLOYEES MUST FOLLOW THEIR AGENCY'S POLICIES."

A telework-ready Contractor is one providing services at a GSA agency worksite and the Contractor is:

- eligible to telework; and
- has the IT tools, equipment, and training necessary to telework.

Non-telework ready Contractors or when a Contractor chooses not to telework will be on leave without pay.

Telework-ready Contractors who are scheduled to perform telework or who are required to perform telework on a day when Federal offices are closed must telework the entire workday, take unscheduled leave, or a combination of both.

7.0 Phase-In/ Phase-Out Overview

The Phase-In/Phase-Out process is defined as a smooth transition from one Contractor to another, in order to maintain the program's integrity required under this and the previous agreements. The Contractor shall take all actions necessary to achieve a successful transition from the incumbent Contractor/GSA Staff and to the follow-on Contractor/GSA Staff.

7.1 Phase-In

If a Phase-In is required, the Contractor shall follow the Government approved phase-in transition plan. The Contractor shall expect to attend an orientation session at or before the start of the award. This session may be virtual or at a central location.

Although the contract's anticipated period of performance begins on 09/30/2018, no work shall commence prior to the award date, though some requirements/tasks may require a Phase-In Process.

The Contractor shall develop a detailed Draft Phase-In Plan outlining the phase-in approach, staffing, activities, risks, and schedule within three (3) days after award to ensure business continuity with no disruption and no impact to existing systems. The COR will provide the Contractor feedback on the phase-in plan and allow the Contractor to make revisions as needed. The Contractor shall resubmit the Final Phase-In Plan three (3) business days after COR provides feedback to the Contractor.

The Contractor shall use the time between contract award and contract start to prepare for and achieve full operational status on the first day of required services. To accomplish this level of operational readiness, the Contractor shall implement the Final Phase-In Plan, which should be submitted as a draft as part of the technical proposal in response to the solicitation. Site access shall be permitted during phase-in to the extent that it does not interfere with the operation of the Incumbent Contractor. The Contractor shall coordinate with the COR for site access permission.

The phase-in plan shall address no less than the following:

- Receipt of the systems
- Inventory of all outstanding maintenance requests/enhancements/issues
- Manpower requirements: personnel staff-up to full staff hand-off with the incumbent Contractor and service levels during phase-in
- Personnel recruitment
- Personnel orientation
- Site familiarization
- Material Equipment On-hand levels verification and validation
- Assumption of responsibility and accountability of Government furnished property
- Telephone Services
- Contractor provided supplies and equipment
- Timelines

7.2 Phase-Out

If a phase-out is required, the Contractor shall maintain fully compliant during the period of time leading up to the contract's expiration or termination. The Contractor shall submit to the Government a phase-out plan sixty (60) calendar days before the contract's completion or termination. The phase-out plan shall address not less than the following.

- Procedures for retaining the staffing levels necessary to maintain required services through the day of the contract's expiration or termination.
- Procedure and responsibilities for performing physical inventory and reconciliation of Government Furnished Equipment (GFE) and Government Furnished Information (GFI).
- Procedure and responsibility for reconciling and certifying material and equipment on-hand levels and accuracy.

The Contractor shall coordinate its phase-out activities with the incoming Contractor to effect a smooth and orderly transition at the end of the contract's period of performance. The Contractor shall provide on-the-job training for the incoming Contractor personnel, as needed by the in-coming Contractor, except for IT training which shall be provided by the Government. The Contractor shall remove all Contractor-owned property from the Government space or facility by close of business on the last day of the contract.

8.0 Travel

If travel is required based on this contract, the Government will negotiate travel expenses and authorize the travel in writing prior to the occurrence of travel. The Government will reimburse Contractor for all travel expenses in accordance with the Federal Travel Regulation (FTR). Travel expenses shall be submitted on incident basis.

Local travel is not reimbursable. Local travel shall be considered within fifty (50) miles of the GSA Headquarters and within fifty (50) miles from each Regional Office Buildings

9.0 Government Furnished Equipment (GFE)/ Government Furnished Information (GFI)

Government Furnished Equipment (GFE) or Government Furnished Information (GFI) will be provided to the Contractor during the period of performance of the contract, under the following conditions:

- a. Use of the GFE and GFI is for the sole purpose of completing the requirements of this contract
- b. The contract employee has received a pre-favorable background investigation determination/adjudication; expected to result in a final favorable determination/adjudication, or
- c. The contract employee has already received a final favorable background investigation determination/adjudication.

Note: GFE may include virtual desktop access provided by GSA and does not necessarily constitute the distribution of hardware to the Contractor. Access to the GSA network, whether direct or through other means, such as the GSA Virtual Private Network (VPN), is contingent upon each contract employee having successfully received a pre and final favorable background investigation.

The estimated GFE is six (6) virtual desktops or laptops as determined by the Government.

The anticipated GFI is non-classified information related to GSA IT Office of Corporate Services.

10.0 Security

10.1 Homeland Security Presidential Directive (HSPD-12) and Background Investigations Requirements

For any Contractor personnel performing work under this SOW who shall require access to GSA IT applications, systems, or data, the Contractor(s) shall comply with the Homeland Security Presidential Directive-12 (HSPD-12) security clearance process. This means first obtaining a fingerprint clearance, which typically takes 3-4 weeks. At that point, the Authorizing Official (AO) can grant limited access on a case by case basis. Next, a preliminary favorable adjudication of their National Agency Check with Inquiries (NACI) clearance level shall be received. This process can take 1 to 2 months. Only when a full NACI adjudication is received shall full access be granted. This process usually takes four (4) to eight (8) months, though it could take as many as 12 months.

The Contractor(s) shall submit the necessary paperwork to conduct a National Agency Check with Inquiries (NACI) background investigation for each proposed personnel prior to working on the contract. Contractor(s) shall not be granted access to a GSA facility or to any GSA IT system prior to a favorable response to the fingerprint portion of this background investigation. An individual Contractor's failure to return satisfactory results from the background investigation shall result in immediate removal of that Contractor.

Higher levels of clearance shall also be required depending on the level of trust required to perform specific duties or perform a specific task. For any Contractor who shall have access to Sensitive but Unclassified (SBU), Financial Transactions, Personally Identifiable Information (PII), or any data that is deemed to require a higher level of trust, a Minimum Background Investigation (MBI) shall be required.

The Contractor shall be required to fund their employees' security clearance and background investigation processes; the Government will not provide funding for these requirements.

10.2 Contractor Staff Reporting Requirement

The Contractor shall maintain a Contractor Staff Roster and be made available to the Contract Officer / Contract Officer Representative within 2 business days of written request. The roster shall minimally contain the full name of each active employee assigned to this task and indicate the required Background Investigation Level for each Contractor individual in accordance with their submitted proposal.

Contractor Responsibilities:

- a. The Contractor shall prescreen all personnel requiring access to the computer systems to ensure they maintain the appropriate Background Investigation, and are able to read, write, and clearly speak and understand the English language.
- b. The Contractor shall bear the expense of obtaining background investigations.
- c. Within 3 business days after award, the Contractor shall provide a roster of

Contractor and Subcontractor employees to the COR to begin their background investigations. At the time the roster is provided the Contractor shall provide a completed Contractor Information Worksheet (CiW). This document is updated frequently, for reference the Contractor may refer to the COR and or the GSA Insite Page <https://insite.gsa.gov/portal/content/653838> (internally accessible). The roster shall contain the Contractor's Full Name and individual background investigation level requirement.

d. The Contractor should coordinate the location of the nearest GSA fingerprinting office through the COR. Only electronic fingerprints are authorized.

e. The Contractor personnel will receive an email notification from the Security and Investigation Center (SIC), through the Electronics Questionnaire for Investigations Processes (e-QIP) identifying the website link that includes detailed instructions regarding completion of the investigation documents (SF85, SF85P, or SF86). The Contractor personnel shall submit all required information related to their background investigations utilizing the Office of Personnel Management's (OPM) Electronic Questionnaire for Investigations Processing (e-QIP).

f. The Contractor is to certify and release the e-QIP document, print and sign the signature pages, and send them following the instructions provided by e-QIP.

g. The Contractor shall be responsible for the actions of all personnel provided to work for the Government under this contract. In the event that damages arise from work performed by Contractor provided personnel, under the auspices of this contract, the Contractor shall be responsible for all resources necessary to remedy the incident.

h. A Contractor may be granted unescorted access to GSA facilities and/or access to GSA Information Technology resources (network and/or protected data) with a favorably adjudicated clearance consummate with the access required. There is no waiver or temporary access to Government-furnished Information without the required favorably-adjudicated clearance.

i. The investigative history for Contractor personnel working under this contract must be maintained in the database of the Office of Personnel Management (OPM).

j. The Contractor, when notified of an unfavorably adjudicated background investigation on a Contractor employee as determined by the Government, shall withdraw the employee from consideration in working under the contract.

k. Failure to comply with the Contractor personnel security investigative requirements may result in termination of the contract for default.

10.3 Privacy Act

Work on this project may require that personnel have access to Privacy Information. Personnel shall adhere to the Privacy Act, Title 5 of the U.S. Code, Section 552a and applicable agency rules and regulations.

10.4 Protection of Information

The Contractor shall be responsible for properly protecting all information used, gathered, or developed as a result of work under the contract. In addition, the Contractor shall protect all government data, equipment, or information by treating the material as sensitive. SBU information, data, and/or equipment shall only be disclosed to authorized personnel. The Contractor shall ensure that appropriate administrative,

technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, and/or equipment is properly protected. When no longer required, this information, data, and/or equipment shall be returned to Government control, destroyed, or held until otherwise directed. Items returned to the Government will be hand carried or mailed to the COR using certified mail. The Contractor shall destroy unneeded items by burning, shredding, or any other method that precludes the reconstruction of the material.

10.5 Non-Disclosure Agreements

If determined to be required by the CO; Contractor and its personnel shall be required to sign non-disclosure agreements (NDAs).

10.6 Organizational Conflict of Interest

FAR Subpart 9.5, Organizational Conflicts of Interest, applies. If the CO determines that an offeror may have a potential organizational conflict of interest, then the Contractor shall be required to submit a mitigation plan and, if awarded, comply with any procedures put in place to avoid or mitigate conflicts.

11.0 Administration

11.1 GSA Electronic Invoicing.

Procedures for Payment. All invoicing shall be done electronically. Password and electronic invoice access shall be obtained through GSA web site <https://vcss.ocfo.gsa.gov>. Invoices shall be itemized as per the specific line items utilized during that billing period.

Billing and payment shall be accomplished in accordance with this clause. The Contractor shall have the invoice certified by the client representative. The Contractor's invoice shall be for no less than one month. The Contractor shall invoice only for the hours, travel, and/or unique services ordered by GSA and actually used in direct support of the client representative's project.

A copy of the Government's document (receiving report) accepting the covered services shall accompany invoices submitted for payment. A copy of the invoice shall be submitted via email to the Government PM, along with the monthly status reports, at the same time that it is submitted for payment. Failure to comply with the procedures outlined above shall result in your payment being delayed.

The Contractor shall submit with a GSA Form 1142- Release of Claims with submission of the final invoice at the end of the period of performance. A copy of the form should be sent via email to the Contracting Officer identified in Block 26A of the award document (GSA Form 300) and to the Contract Specialist and COR identified as the Government POCs in this SOW.

11.2 Inspection and Acceptance

The Government will have ten (10) business days to complete the review of each deliverable and accept or reject the deliverable by giving written notice. When the

Government fails to complete the review within the review period, the deliverable shall become acceptable, unless an extension of the review period is requested and mutually agreed upon. In the event of rejection of any deliverable, the Contractor shall be so notified in writing by the Government PM or CO, giving the specific reason(s) for the rejection. The Contractor shall have five (5) business days to correct the rejected deliverable and return it to the Government PM. The Contractor shall be allowed two (2) resubmission of deliverables.

11.3 Unauthorized Commitment

The Government PM or any other client representative is not authorized to change any of the terms and conditions of the resultant task orders. Changes, if any, shall be made by the CO only.

11.4 Personal Service

The client has determined that use of the GSA contract to satisfy this requirement is in the best interest of the government, economic and other factors considered, and this task order is not being used to procure personal services prohibited by the Federal Acquisition Regulation (FAR) Part 37.104 titled "Personal services contract".

12.0 Government Points of Contact

Sharmel Lane
Contracting Officer
GSA, OAS, Office of Internal Acquisition
1800 F Street NW
Washington, DC 20405
sharmel.lane@gsa.gov

Chudi Okafo
Contracting Officer's Representative
GSA, GSA-IT
1800 F Street NW
Washington, DC 20405
chudi.okafo@gsa.gov

12.0 Quote Submission

Contractors shall prepare and deliver technical and price quotes that shall be evaluated in determining the “best value” quote. All quotes shall be submitted via email to sharmel.lane@gsa.gov by **9:00AM Eastern Time (ET), Friday, September 21, 2018**. The price quote shall be a separate volume, .pdf attachment as well as the Excel version without formulas, from the technical volume.

Large email attachments can be delayed during regular business hours. GSA has an attachment size limit of 20 MB. If this is a problem, submit as multiple emails with small attachments, or with enough time to clear the server delays. Quotes not time stamped in the receiving email inbox, at or earlier than the due date and time, will be late and not accepted.

Questions regarding the SOW or RFQ may be submitted to sharmel.lane@gsa.gov by **4:00PM Eastern Time (ET), Monday, September 17, 2018**. Responses to all Contractor questions will be emailed to all Contractors as an amendment to the RFQ by **12:00PM, Tuesday, September 18, 2018**.

13.0 Methodology for Award

The Government intends to award a Firm Fixed-Price task order for the services on the basis of: Lowest Price Technically Acceptable (LPTA) resulting from a technically acceptable quote with a fair and reasonable evaluated price. Failure to meet a task requirements specified herein, may result in the offer being determined technically unacceptable. The Government intends to select on contractor for award of this requirement.

NOTE: THE AWARD WILL BE MADE ON THE BASIS OF THE LOWEST EVALUATED PRICE OF PROPOSAL MEETING OR EXCEEDING THE ACCEPTABILITY STANDARDS FOR NON-COST FACTORS.

14.0 Acceptability Standards

For the purpose of evaluating the Technical quote, the Government shall use the Adjectival Rating evaluation criteria described below:

Adjectival Rating	Definition
Acceptable	The contractor demonstrates a thorough understanding of the Government's requirements and the technical quote fully meets the Government's specified requirements as outlined in the SOW.
Unacceptable	The contractor does not demonstrate a thorough understanding of the Government's requirements and the technical quote does not meet the Government's specified requirements as outlined in the SOW.

14.1 Criteria 1: Demonstrated Capabilities (Acceptable/Unacceptable)

The offeror shall provide a technical quote that includes an overview of how they will meet the solution requirements and describe at least one (1) and no more than two (2) representative projects involving enterprise Alfresco-based content management systems, with at least 1,000 users, including integrations with eSignLive (aka OneSpan Sign) digital signature technology. Projects referenced must demonstrate experience with and capabilities reflecting the Objectives identified in the SOW. Projects must demonstrate experience managing an enterprise-wide Alfresco content management system and analyzing content from Documentum and overseeing migration of that content into an Alfresco system. Projects must also demonstrate experience analyzing document signing workflows, and designing technical approaches to implementing automated digital signature workflows using eSignLive (aka OneSpan Sign). Projects must also reference experience implementing Records Management workflows in Alfresco.

The Government will evaluate the manner and extent to which Offerors can meet the objectives outlined in the SOW and assess the offeror's overall understanding of the requirements to manage an enterprise-wide content and records management system in a public sector environment. To be determined technically acceptable, the offeror's representative project(s) must sufficiently demonstrate experience with the specific requirements described in the SOW.

Basis of Evaluation: The Offeror's technical quote will be evaluated for technical acceptability on an "Acceptable"/"Unacceptable" basis. The Offeror shall be evaluated in order to determine they fully understand and are capable of providing the tasks, requirements, expectations and technical aspects of this task order.

Note: If the Offeror receives a rating of **unacceptable** for this factor, no other consideration will be provided.

14.2 Criteria 2: Skills and Experience (Acceptable/Unacceptable)

The offeror shall provide resumes of proposed staff that would be assigned to the work described in the SOW. The offeror shall highlight the skills offered by the staff that help specifically meet the requirements of the SOW for each of the designated labor categories. The Government will evaluate the offeror's ability to provide staff with skills in the specific commercial technologies employed by the Government (Alfresco and eSignLive (aka OneSpan Sign) to meet the requirements in the SOW, and demonstrated experience with Agile methodologies. To be determined technically acceptable, the offeror's quote must address the offeror's skills as described above and in the SOW.

Basis of Evaluation: The Offeror's technical quote will be evaluated for technical acceptability on an "Acceptable"/"Unacceptable" basis. The Offeror shall be evaluated in order to determine the experience and qualifications of the proposed personnel to ensure they are fully capable of meeting the Government's needs.

14.2 Criteria 3: Past Performance (Acceptable/Unacceptable)

For the "Past Performance References", the Government will use the system generated reports from the Contractor Performance Assessment Reporting System (CPARS). Additionally, the Government will review information from the Past Performance Information Retrieval System (PPIRS) at www.ppirs.gov to evaluate the Contractor's past performance. The Government reserves the right to interview Program Manager, Contracting Officers and other sources with knowledge of the Contractor's past performance.

Basis of Evaluation: The Offeror's technical quote will be evaluated for technical acceptability on an "Acceptable"/"Unacceptable" basis. The Offeror's past performance shall be evaluated to determine that they have performed successfully on requirements concerning EDMS and DSS support.

15.0 Price Evaluation

This SOW will be firm-fixed-price for all management support activities. The Offeror shall submit pricing for the specified period of performance, as outlined in the Required Price Quote Template. GSA seeks discounts, or price reductions, from the GSA Schedule rates. The Contractors' total price and pricing shall be evaluated and compared, including any discounts offered by Offerors' off of their GSA Schedule 70 pricing. GSA will evaluate the Offeror's pricing for reasonableness. Offerors' pricing shall establish confidence for successful performance and completion of the SOW requirements.

The Offeror shall complete the attached Required Price Quote Template and shall submit the document as an individual Microsoft Excel file entitled (Offeror's Name) - Required Price Quote.

The narrative section of the price quote shall be named (Offeror's Name) – Price Volume.

16.0 Proposal Instructions

The technical proposal shall all be delivered as electronic documents and formatted to fit on 8 1/2" by 11" paper with no less than 1" margins on all four sides of each page. The proposal font must be font style Times Roman size 12. Tables, graphs and charts must use font size not less than 10. The evaluation will not consider any information on pages exceeding the page limitation which is twenty-eight (28) for technical and four (4) pages for price. Cover pages, transmittal letters and table of contents are excluded from the page count.

Technical Quote	Page Limit and Submission Process	Submission Item	Required Template
Evaluation Factor 1	Maximum of ten (10) pages in the Technical Quote	Demonstrated Capabilities	N/A
Evaluation Factor 2	Maximum of eighteen (18) pages. No more than three (3) pages per resume. Resumes shall be submitted as an individual Microsoft Word or Adobe PDF file(s) entitled (Offeror's Name) – Resume of (Individual Name)	Skills and Experience	N/A
Price Quote	Page Limit and Submission Process	Submission Item	Required Template
Price Evaluation	Maximum of four (4) pages	Price Narrative	N/A
Price Evaluation	Excel Price Template	Price	Yes

ATTACHMENTS

Attachment A, Required Price Quote Template